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MEETINGS **START HERE**

2015

Meetings Trend Watch

21

ideas, thought shifts, and external
forces you need to be aware of to
succeed this year

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TRANSFORMATION TIPPING POINT

We are at a dynamic inflection point in global meetings. Technology, the sharing economy, and Millennials entering leadership positions are creating a transformative force. Meetings content is becoming more of a collaborative effort between attendees and presenters, and the forces of disruption are at work throughout the meeting planning industry. Here's a quick look at some trends planners should be thinking about embracing, and some they should be prepared to confront.

BIG EVENTS CALL FOR THE BIGGEST STAGES.

"THE MEETING SPACE GAVE US FLEXIBILITY TO ACCOMPLISH A TRADE SHOW, A GENERAL SESSION, MEALS AND BREAKOUTS ALL IN ONE AREA. WE WERE THOROUGHLY IMPRESSED AND LOOK FORWARD TO BRINGING OTHER GROUPS TO OUR NEWFOUND FRIEND, MOHEGAN SUN."

— MARY O'CONNOR,
PRESIDENT OF MARY O'CONNOR AND CO.

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4

Tech Trends to Watch

1

LIVE STREAMING CHANGES THE GAME

Technology has allowed attendees to be included in meetings regardless of geographical location and has resulted in many options for attendees to share the event with others. Attendees can experience two-way interactions, and events can be recorded and shared post-event.

The challenge to such meetings, says Nicola Rossetti, vice president of global marketing for event management technology firm etouches, has always been the awkward screen experience. "Successful hybrid events are often those that have a specifically designed online context, with a dedicated interface, somehow independent from what occurs on site," he notes. "That said, a lot of events become hybrid in the sense that there are more and more strategies, mostly around social media, to engage a broader audience on what is shared during an event."

One way to deliver better content is through myriad perspectives, such as live streaming, Instagram, and Snapchat in the hands of the attendees. "We are using Snapchat for meetings, conferences, and trade shows," says Bonnie Boisner, vice president of event management for Aimia. "It creates an experiential element that allows attendees to share their timely and most authentic event moments with all their followers - those at the conference and back home. We will continue to see a rise in on-demand geofilters for events into 2017."

Corbin Ball, CMP, CSP, DES, MS and principal of Bellingham, WA - based Corbin Ball Associates, says, "we will see increased demands for live-streaming events by attendees; the challenges for event planners will be increased bandwidth demand."

2017 Mission Critical

59%

of planners cite
using technology to
improve the quality of
meetings

2017 Mission Critical

55%

of planners cite getting
enough Wi-Fi bandwidth
to meet the needs of
attendees

2

APPS BECOME DATA GATHERERS



There has been an uptick in meeting and event technology usage such as Cvent or Lanyon's StarCite, along with increased use of both customized apps and Twitter. However, today's planners are more discerning in what they want. According to Rossetti, "Gone are the days when all that people want is a shiny app. The big change is that organizers have started to understand that the app is not just a tool at the time of the event, but a component that needs to be integrated throughout the entire cycle. The app becomes a key data collector, allowing the organizer to get a granular and insightful understanding of the event. With the right analytic tool or environment, the app brings tremendous value to the organizer, improving event performance in real time and making future events much better."

However, each stage of the entire enterprise depends on Wi-Fi. Says Rossetti, "all the large venues have now invested in robust infrastructures. Buyers have become experts and are now asking the right questions, from concurrent devices sessions to bandwidth or the number of connected devices. The challenge remains in the business model where venues have a basic translation from cost to return and sell this key component at a non-sensible price point, taking the organizer into a near-hostage situation."

Rossetti adds: "Many specialized companies have a prepackaged environment for hotels that are specifically geared toward event management. While more expensive, they often provide a better and more secure alternative."

2017 Mission Critical

37%

of planners cite effectively integrating technology into meetings



3

AUDIENCE ENGAGEMENT

Upping audience engagement and two-way knowledge sharing is certainly something planners want to do more and more of at their meetings and conferences. And now the social media tools are in place to allow participants to post comments and interact with show organizers and content presenters in real time.

"Based on the likes and frequency of similar topics being posted, the audience becomes part of, and extends, the content creation and exchange process," says Carina Bauer, CEO, IMEX Group. "This is much more dynamic than a one-to-many format and is a pretty cool way to plug people into each other, the speaker, and the content more directly."

Beacons are another effective way to track and interact with attendees. Julius Solaris, editor of Event Management Blog, calls beacons "one of my favorites when it gets to offline analytics and on-site metrics to better analyze what happens at our event. This is especially

valuable to present sponsors and exhibitors with modern KPIs [key performance indicators] that make sense in a digitally enabled environment.” He adds that the same principle can be applied to NFC and RFID technology - with different cost and proximity requirements.

A technology that Solaris believes will be of growing interest is audio beacons, which send out inaudible sounds that can trigger a message or experience on an attendee’s smartphone or computer, if they’ve installed the app or software. “The amount of attention and funding companies powering audio beacons are receiving make it very sexy and relevant,” he says. “[Planners can] send audio tunes to attendees to activate content on apps, all wirelessly.”

2017 Mission Critical

40%

of planners cite getting attendees on-site to use the social media tools

2017 Mission Critical

30%

of planners cite using data from technology tools to measure event ROI

4

ACTIONABLE ROI MEASUREMENT HAS ARRIVED

The ability to show an organization the return on investment it receives on its entertainment events and client appreciation offerings is of paramount importance. Management needs to see how the client entertainment they invested in actually drove business results in order to invest more in the kind of events that contribute to the bottom line.

“We’re looking at how to make sense of the data that comes out of events, so companies can use it to their benefit and create change or reallocate that spending to get better outcomes for their company,” says etouches President and CEO Oni Chukwu. For example, a client of etouches used the program to set goals for a conference focused on the introduction of a new product, educating customers about it, and gathering qualified leads from those interested in buying it. The client set target counts and minimums for specific participant characteristics such as industries, roles, and regions.





Meetings Content Evolves



THE EXPERIENCE TAKES CENTER STAGE

Experiential meeting design is going to become “a commonplace element of many meeting agendas,” says Brian King, global officer, digital, distribution, revenue management & global sales for Marriott International. He goes so far as to predict that experiential design will “reach a tipping point in 2017.” Research showing that the meeting space itself influences retention and that more memorable or inspirational settings actually boost learning underpins this trend. But another driver is the Millennial generation, whose members generally want experiences that are authentic.

Experiential meetings are also becoming part of the conference program. Bonnie Boisner, vice president of event management for Aimia, says that sessions are being shortened to create opportunities for hands-on learning and for interactive breakout sessions that will accommodate many learning styles - “not just those who learn best by listening to a speaker in the front of the room,” she says

2017 Mission Critical

48%

of planners cite creating compelling meeting content



THE MANDATE FOR PERSONALIZATION

Personalization will continue to grow in importance. Planners will need to make sure everyone has their chosen experience within the larger event. To this end, you can tailor the messaging and information that you give to individual attendees. “The data you collect on attendees’ past choices can help you do this for future meetings, which ultimately makes the events more successful,” Bauer points out.

Another aspect of the personalization trend is helping your attendees “find their tribe,” that is, find the people at the event who are going to be their best matches from a business or personal perspective. Bauer says the two sides of personalization “play together.” In effect, this trend is about “how do you break everything down for attendees so [your event is] more navigable for them?”

3

ALL MEETINGS ARE MARKETING

"Engagement" is the buzzword du jour across the meetings and events industry. It's such a big topic that an entire discipline - "live engagement marketing" (LEM) - has emerged to help meeting planners create and leverage engagement at their events. What it truly means to engage attendees, however, isn't always clear.

To the uninitiated, LEM is synonymous with event apps, which attendees can use to consume event content and to interact with each other and with meeting organizers. Attendees who download and use apps (the thinking goes) feel more intimately connected to the meeting and more personally invested in driving positive meeting outcomes in an event's education, networking, and procurement.

At the simplest level, LEM is the discipline of applying digital marketing techniques to physical-world events. That's really the root of it - applying some of the techniques we've seen emerge over the last 15 years in the online world, like measurement and optimization and targeting, to the analogue world of live meetings and events. LEM can be broken down into three phases.

STAGE ONE is all about technology adoption and engagement. Can you get attendees of meetings and events to use technology as they navigate the event in order to generate data that can be collected and understood? That's the stage most events are at right now with the adoption of mobile event apps, which attendees are using as digital concierges as they navigate events.

STAGE TWO is for measurement and analytics. If you think about all this engagement on the tech at live events that's generating all this data exhaust - all these signals that can be parsed and understood - stage two is all about visualizing that data in a way that's actionable. It's about understanding from data what's working at the event and what isn't.

STAGE THREE, which is the hardest stage of all, is about influence. Not only can you measure what's happening at your event, but you can also use technology to react to the data to shape the outcome of your events. We like to think about events as funnels, where there's a low engagement level at the top of the funnel and a business outcome at the bottom of it. For a sales or marketing event, the business outcome is typically more sales. For an education event, it's teaching people stuff. For a networking event, it's driving maximum meetings and connections. Stage three of LEM is about influencing the velocity with which attendees flow through this funnel and get to the desired business outcome.

It's not about the mobile event app; it's about how you can use data to optimize your events like you would optimize a webpage, and also how you can take that data and pump it into other systems of record like your CRM and your marketing automation software. That's the big job. Data from meetings and events can be used not only to throw better events, but also to help your salespeople close more deals as you learn more about attendees.

2017 Mission
Critical

54%

of planners cite
proving ROI for
meetings



The Age of Disruption

1

SHARING ECONOMY GAINS A Foothold

“Many of the procurement questions revolve around technical aspects of ‘duty of care.’ For example, ground transportation companies can measure cost, insurance levels, safety, and security requirements, and go through a traditional procurement process, but the Transportation Network Company (TNC) space is much different,” says Tony Wagner, vice president, Americas, CWT Meetings & Events. “TNCs simply don’t have to comply with the same rules and regulations.”

However, even as Airbnb and other short-term rental companies are being legally challenged around the world, rideshare companies — notably Uber — have managed to steamroll their critics.

2

HEIGHTENED SECURITY

In the fall 2016 edition of MPI’s Meetings Outlook, Bill Voegeli of the MPI Georgia Chapter and president of Association Insights — the Atlanta-area research firm that conducted the survey — confirmed that safety and security are the top budget request for 2017.

3

HEALTH WATCH

Health concerns, be they contagious diseases such as Zika, disasters, or other emergency situations, are also top of mind. According to the 2017 American Express Global Meetings and Events Forecast, “safety and security” is a component included in 57 percent of organizational meetings policies in North America.

In opposition to the concern for security is the sharing economy, whose advocates say that users are putting themselves in the hands of strangers with opaque safety histories.

6

Reasons 2017 Will Not Be a Buyer's Market

THE INCENTIVE, MEETINGS, AND CONVENTIONS MARKET HAS BEEN BUZZING WITH REPORTS THAT HOTELS NO LONGER HAVE THE UPPER HAND IN CONTRACT NEGOTIATIONS, AND THAT A BUYER'S MARKET IS HERE. THE MAIN REASON IS THE FACT THAT HOTEL SUPPLY IS EXPECTED TO SURPASS DEMAND FOR THE FIRST TIME SINCE 2009.

1 The new properties being built are largely in the limited-service category, with little if any meeting space.

2 The three hotel categories that dominate meetings and incentive travel — luxury, upper upscale, and upscale — all have an annual occupancy rate of about 75 percent, which means they are essentially full.

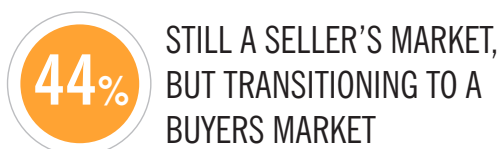
3 A lot more people are traveling and staying at hotels. The transient business is strong in the top 25 markets. Non-group business is 140 percent of what it was in 2010. Millennials in the 28-34-age range are traveling more, and boomers are not traveling less.

4 The strong-and-getting-stronger dollar might be making the U.S. much more expensive for international groups, yet we have not seen it impact travel to the U.S. because the huge growth in international leisure travel by the Chinese is more than making up for it.

5 Meetings budgets in 2017 may look flat, but it depends on where you're standing. According to a recent survey of meeting professionals by Destination Hotels, 37% of respondents say that they have more money to spend on meetings in 2017 — a significant jump from the 31.5 percent who said so last year. Just 6 percent say their total meetings spend will decrease, down from 11 percent last year. But 30 percent say they will also plan more meetings in 2017. Taken together these figures show that more money will be spent on more meetings in 2017 — but not that planners will have more money to spend per meeting.

6 Food and Beverage prices are on the rise. According to the CWT Meetings & Events 2017 Forecast, food and beverage prices are expected to rise due to increased production prices, changes in imports and exports, and other considerations. F&B pricing was again the third-most critical factor for planners when selecting a property.

PLANNERS' SENSE
OF THE 2017
MARKETPLACE:



5

Trends Changing Incentive Travel

**SPECIAL
BONUS
SECTION**

Incentive travel is booming. According to the Incentive Research Foundation (IRF), “Budgets are up to over \$3,000 per person on average, with 30 percent of budgets being between \$3,000 and \$4,000,” reports Melissa Van Dyke, president of the IRF.


The incentive travel industry is healthy, and compared to last year, incentive travel budgets are increasing, agrees Bonnie Boisner, vice president of event management at Minneapolis, MN-based Aimia, a leading incentive and loyalty marketing company.

“This will not only spur increased supplier competition, but will also force suppliers to meet the heightened expectations of their clients,” says Boisner. “According to a survey by the Society for Incentive Travel Excellence (SITE), 70 percent of suppliers recognize they need they need to improve their incentive travel services and they are finding more creative ways to add value.”

In this robust market, there are very specific trends shaping incentive travel. Here are five of the most significant:

1 EXPERIENTIAL TRAVEL

Hearing the roar of a lion during a South African safari... an afternoon spent immersed in the Maori culture in New Zealand... a car rally along the Monaco Grand Prix route... these are one-of-a-kind experiences unique to the destination. By incorporating the exoticness of the location the group is in, unforgettable experiences are created. When a group experiences the out-of-the-ordinary together, be that a meal, unique activity, or tour, the camaraderie - not to mention the memories created - will be priceless.



“Overwhelmingly, creating an unforgettable experience continues to be everything,” says Boisner. “Participants are looking for incentive travel programs that cannot be replicated on their own. The future will continue to demand a higher degree of customization and heightened experiences for participants.”

2 WELLNESS TRAVEL

Wellness travel and retreats — experiences that leave travelers healthier when they check out than when they checked in — are increasingly popular with incentive groups.

Wellness travel is far more than a passing trend. It is a \$489 billion global market, according to the most recent research from the Global Wellness Institute. These global wellness tourism numbers were updated in October, when released at the Global Wellness Summit, and GWI predicts this number will grow to \$679 billion by 2017. That represents an approximate annual 10 percent growth since 2012. “Wellness travel destinations offer a wide range of group activities from yoga to rock climbing that are a perfect fit for teambuilding activities. And they offer ample opportunity to learn new skills, such as meditation, that will ultimately reduce stress and enhance performance,” says Beth McGroarty, research director of Miami, FL-based Spafinder Wellness, a marketing, gifting, incentives, and rewards company for the wellness industry. A retreat or trip to a wellness travel destination shows employees and clients that management cares about their health and happiness and underscores the company’s core values.

3 BESPOKE TRANSPORTATION

Who would have ever thought it would cost \$50 to check a second bag, \$11 for a meal, and \$10 for extra legroom? Feeling chilly? A pillow and blanket costs \$7. Beyond these lucrative new charges, airlines have cut expenses by abandoning some smaller airports, making it even harder to reach certain destinations. Then there are labyrinthine

security lines, interrupted service, and delays, to say nothing of overcrowded planes.

Incentive planners are finding just the opposite is true with charter companies, which set a schedule, itinerary, and even choose an aircraft type based on the needs of the group. The planner also selects departure and arrival points with the capability of landing at thousands of less-congested airports inaccessible to commercial planes.

4 ALL-INCLUSIVE PROPERTIES

The days of unimpressive buffets and bottom-shelf liquor being served at all-inclusive properties are over. More than a few all-inclusives now rival the luxury four- and five-star properties.

All-inclusives simplify meetings and incentives from a strategic and budgetary standpoint as they include accommodations, meals, drinks, transfers, taxes, gratuities, entertainment, and the use, setup, and breakdown of meeting rooms. The company knows exactly what the program will cost going in. It’s also reassuring to know your attendees can get a snack or a drink when they want one without digging into their pockets.

5 EVENT TECHNOLOGY

Technology continues to be at the forefront of incentive event trends because social technology has changed the way we communicate. “We create shareable moments through social walls, unique hashtags, and photo-sharing opportunities. Social applications are a great way to entice and engage participants — especially those who are not at the event, but aspire to earn the trip the following year,” says Aimia’s Boisner.

Mobile apps are now expected at events. They keep participants engaged during the trip by identifying and recognizing top performers while also educating participants with event details and scheduling updates.